

CP INSTRUCTION FORM

Each paper claim file or email notification requires one of these forms, which should be completed and held in the paper file / attached to email to provide the information required for XCS Claims Processing (CP) to issue the SCM. Full details can be found at www.lloyds.com/claimscheme.

If this form is not properly completed the file may be rejected by CP, resulting in a delay. Note: where a claim has more than one claim entry or SCM associated with it (e.g. multiple layers, separate fee entries, entries for different currencies) a separate form will be required for each entry.

Section	Who Should Complete?	When To Complete
A	Leader, and Second Lead if Complex	<u>At every presentation.</u>
B	Leader	Complete in full <u>for any first advice.</u> For existing claims where an SCM has already been issued, only complete any fields that need changing.

SECTION A - TRIAGE		Date:	
Triage Category: <input type="checkbox"/> STANDARD		<input type="checkbox"/> COMPLEX	
Lead Syndicate Name and Number:		Second Lead Syndicate Name and Number:	
Lead Adjuster Name:		Second Lead Adjuster Name:	
Telephone:		Telephone:	
Email:		Email:	
O/S Loss / Indemnity & Orig. Ccy		TBA Code (if O/S Loss is zero, please specify):	
Urgent Settlement? <input type="checkbox"/> <i>Please check this box if Settlement being presented requires urgent processing</i>			
Expert Information: Please complete <i>where only <u>one expert is appointed to a claim</u></i> . Where multiple experts appointed, please complete the 'CP Instruction: Experts, Fees and Expenses' on page 4.			
Type of Expert: Lawyer / Adjuster	Name of Firm:	Individual Expert's Name (if known):	Expert's Reference (if known):
O/S Fee (including Reserve & Sett. Ccy, e.g. GBP/GBP)		O/S Expense (including Reserve & Sett. Ccy, e.g. GBP/GBP)	
Transaction / SCM Narrative (max 50 characters):			

SECTION B - DATA

The leader **must complete this section in full for a first advice.**

On existing claims, only fields that need changing must be completed / altered – therefore please check the existing SCM.

Original Signing Number and Date (OSND)

Cat Code

PCS Cat Code

Cause Code

Loss Fund?

Yes No

In Subrogation?

Yes No

In Coverage Litigation?

Yes No

Direct Report?

Yes No

Claim Narrative (short description of claim)

Insured name

Reinsured name, if applicable

Claimant name, if applicable

Coverholder, if applicable

Current broker (broker number, contact name and telephone)

Medicare claimant, if applicable

Date of Loss

Date Claim Made (liability only)

Loss Date Narrative

Loss Location

Voyage (marine and energy only)

Loss Name

Vessel / Aircraft / Conveyance if applicable

Limits	
Excess	
Slip Order	
Cover Period	
Policy Period	
Perils / Conditions	
Settlement Currency	Settlement Currency Rate of Exchange

CP INSTRUCTION: EXPERTS, FEES & EXPENSES



Where multiple experts are appointed to a single Claims Office Reference (COR), details of **all** third party experts (loss adjusters, lawyers etc) should be captured on this form by the lead. All details for all experts advising on the claim are held in CLASS. In CLASS you can enter details for up to 30 expert organisations against a single COR. An SCM can only contain the details of one adjuster **and** one lawyer. The lead must select which **one** lawyer and **one** adjuster should be advised on the SCM at each movement by ticking the appropriate box below.

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

Expert's Reference		Advise on SCM?	<input type="checkbox"/>
PTT Fee		O/S Fee	
PTT Expense		O/S Expense	

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

Expert's Reference		Advise on SCM?	<input type="checkbox"/>
PTT Fee		O/S Fee	
PTT Expense		O/S Expense	

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

Expert's Reference		Advise on SCM?	<input type="checkbox"/>
PTT Fee		O/S Fee	
PTT Expense		O/S Expense	

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

Expert's Reference		Advise on SCM?	<input type="checkbox"/>
PTT Fee		O/S Fee	
PTT Expense		O/S Expense	

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

Expert's Reference		Advise on SCM?	<input type="checkbox"/>
PTT Fee		O/S Fee	
PTT Expense		O/S Expense	

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

Expert's Reference		Advise on SCM?	<input type="checkbox"/>
PTT Fee		O/S Fee	
PTT Expense		O/S Expense	

Expert Type: Lawyer / Adjuster (delete as appropriate)

Expert Organisation Name:

Name of Individual Expert:

Expert's Reference		Advise on SCM?	<input type="checkbox"/>
PTT Fee		O/S Fee	
PTT Expense		O/S Expense	